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Sanlam Easy Retirement Plan Trustee Profiles

2023

Trustees & Fund Officials

The **Fund Officer** who manages the day-to-day operations of the Fund is



Shiela Chanka

Independent Principal Officer | appointed September 2022

Shiela Chanka is a qualified Chartered Professional Principal Officer (Batseta qualification). She holds a Bachelor of Business Administration Degree, Diploma in Financial Accounting and other retirement fund qualifications. Her extensive experience in the industry covers close to 40 years in retirement funds in various senior management positions in operations and consulting of retirement funds.

She was the Senior Client Manager to the Private Security Sector Provident Fund and the Municipal Councillors Pension Fund. She had the opportunity to work in Retirement Fund Accounting and Administration and moved into Consulting and thereafter into Head of Operations in Retirement Funds.

She was a Director of Administration at Ginsburg Malan and Carsons. She was also the Principal Officer to the PSG Future Wealth Umbrella Funds and Preservation Funds. She mentored many graduates and provided student employment and experience to projects she managed at Alexander Forbes.

Shiela also serves as the Principal Officer of the Sanlam ACA Umbrella Funds.

The **independent trustees** who serve on the Board are



Willem Welsh

Independent trustee & Chairman | appointed February 2021

Willem Welsh has over 40 years of experience in employee benefits, the last 32 of which were spent in client services and consulting. Willem started in the industry as an Employee Benefits Administrator and has spent the past few years working as the Operations Manager for Client Services Consulting at ACA Employee Benefits (ACA), which was part of the Sanlam Group and is now Simeka Consultants and Actuaries (Simeka).

Before retirement in 2020, Willem was registered as a Key Individual for ACA and Simeka at the FSCA.

Currently Willem serves as an independent trustee on a number of umbrella retirement funds.



Steve Dold

Independent trustee | appointed November 2020

Steve Dold is a Chartered Secretary with extensive prior experience in the corporate environment. His corporate career experiences span from Company Secretary, Financial Director, Corporate Governance Director, Retirement Fund Trustee and Chairman. He has also been an independent trustee on various umbrella retirement funds.

Steve is a practicing member of the Corporate Governance Institute, Southern Africa (CGISA), the Ethics Institute of South Africa and a former executive of Coaches and Mentors of South Africa (COMENSA). He is also actively involved in several non-profit organisations; specifically focused on education and enterprise development.

He previously lectured Applied Governance at Wits Plus, Centre for Part-time Studies, for students studying towards the CGISA International Qualifying Board Examination. He currently represents Batseta on the South African National Standards Technical Committee for the ISO 37000 standard for organisational governance.

Trustees & Fund Officials

The **sponsor-appointed trustees** who serve on the Board are



Anita Roodman

Sponsor-appointed trustee | appointed September 2022

Anita Roodman is a Technical Manager at Simeka with over 20 years of experience in the financial services industry. She started her career at the Joint Municipal Pension Fund in 1995 as a Legal Advisor and later joined ACA Employee Benefits (ACA). Anita was contracted by Simeka following the acquisition of ACA by Sanlam.

She obtained a Baccalaureus Juris from the North West University and an Advanced Post Graduate in Financial Planning from the University of the Free State in 2005. She also successfully completed her FAIS RE5 exam and attained the CFP designation from the Financial Planning Institute. Anita is a member of the Pension Lawyers Association and serves on the IRFA Legal and Technical Committee. Anita also serves as trustee on a number of retirement fund board of trustees.



Mpho Kgomongoe

Sponsor-appointed trustee | appointed February 2021

Mpho Kgomongoe is a Legal and Technical Specialist at Simeka, with over 10 years of experience in the financial services industry. She joined ACA Employee Benefits (ACA) in August 2018 as a technical consultant. Mpho was contracted by Simeka following the acquisition of ACA by Sanlam. She previously worked for Alexander Forbes as a legal advisor.

She obtained her Bachelor of Laws at the University of the Witwatersrand, Post Graduate Diploma in Compliance at the University of Johannesburg and Post Graduate Diploma in Financial Planning Law from the University of Free State and a Pension Fund Law certificate from the University of South Africa. Mpho is a member of the Pension Lawyers Association and is the current Deputy President of the Association.

She obtained a certificate in the Executive Development - Sanlam Ignite Programme with Stellenbosch Business School.



Yolanda Cezula

Sponsor-appointed trustee | appointed March 2023

Yolanda Cezula is contracted as Executive Consultant at Sanlam Umbrella Solutions with 14 years of experience in the financial services industry. She started her career in the retirement fund industry at Old Mutual Corporate as Service Consultant where she was responsible for post-sales servicing of intermediaries and clients. She also served as an Employee Benefits Consultant at NBC Holdings where she consulted to a number of large stand-alone funds.

Yolanda joined Sanlam in 2018, serving as Product Expert for the Sanlam Umbrella Funds. She obtained her Post Graduate Diploma in Financial Planning Law through Milpark Education and further holds a National Diploma in Accounting obtained at the Cape Peninsula University of Technology.



Shamiega Manuels

Alternate Sponsor-appointed trustee | appointed March 2023

Shamiega Manuels has over 20 years' experience in the financial services industry and spent her career in the contractual and legal departments with 2 of the other top 5 insurance companies. She re-joined Sanlam as the Technical Manager in Sanlam Group Risk Contracts department in 2018 after 12 years in the Old Mutual Product Legal department. Shamiega holds a certificate in Pension Funds Law, a certificate in Practical Management and in 2022 received a certificate in the Executive Development Sanlam Catalyst Programme with the University of Stellenbosch Business School. Shamiega is currently busy completing studies in Economic and Management Sciences with UNISA.

